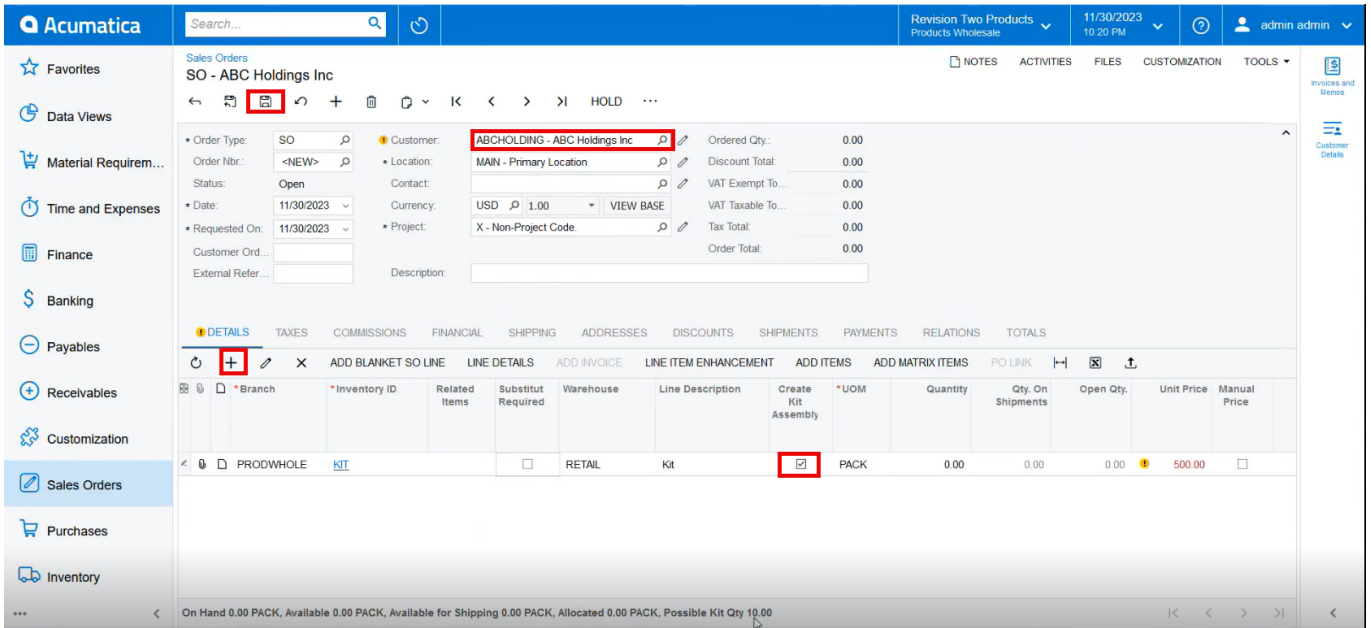


Create Kit Assembly on Sales Orders Save

- ✖ You must navigate to the left panel of Acumatica and click on **[Inventory]** and then click on **[Stock Items]** under **[Profiles]**.
- Search for the **[Customer]**.
- Click on the **[+]** icon.
- Search for **[Branch]**, **[Warehouse]**.
- Enable the check box for **[Create Kit Assembly]**.

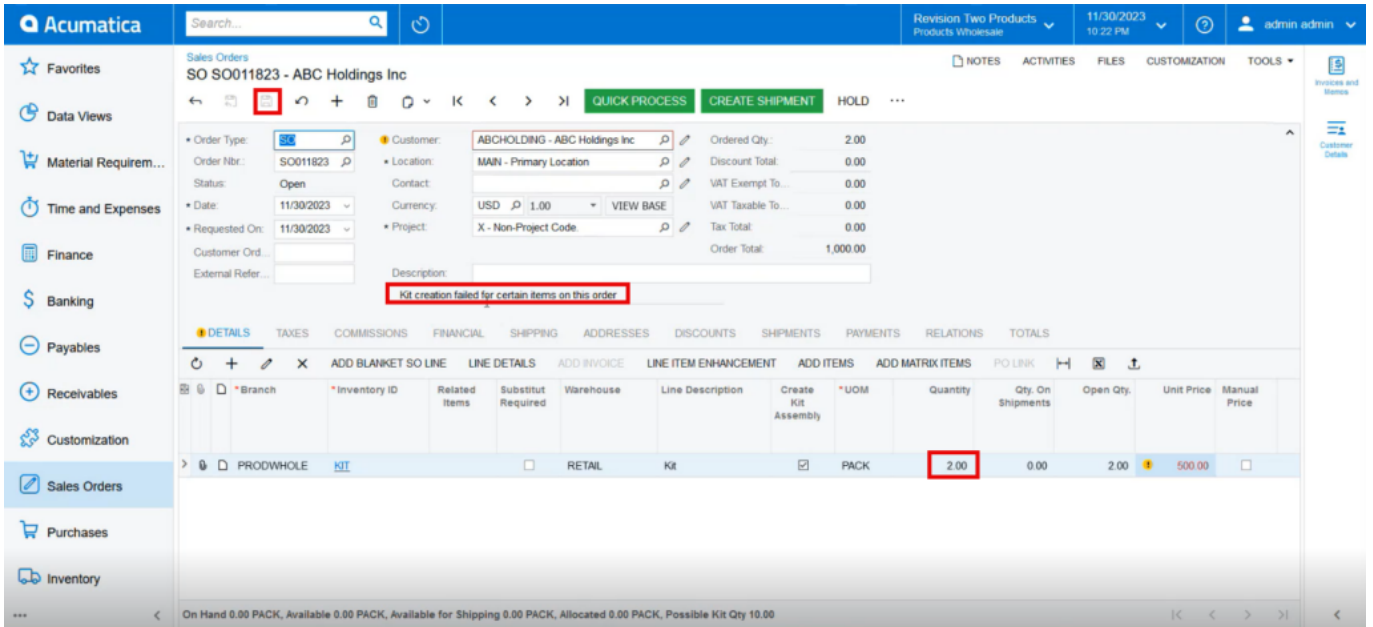


The screenshot displays the Acumatica interface for a sales order. The top navigation bar includes the Acumatica logo, a search bar, and user information. The left sidebar shows various modules like Favorites, Data Views, and Sales Orders. The main area shows the sales order details for 'SO - ABC Holdings Inc'. The 'Customer' field is highlighted in red and set to 'ABCHOLDING - ABC Holdings Inc'. The 'Create Kit Assembly' checkbox is also highlighted in red and checked. Below the form is a table with columns for Branch, Inventory ID, Related Items, Substitut Required, Warehouse, Line Description, Create Kit Assembly, UOM, Quantity, Qty. On Shipments, Open Qty., Unit Price, and Manual Price. A row is visible for 'KIT' with a quantity of 0.00 and a unit price of 500.00.

Branch	Inventory ID	Related Items	Substitut Required	Warehouse	Line Description	Create Kit Assembly	UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Manual Price
PRODWHOLE	KIT			RETAIL	Kit	<input checked="" type="checkbox"/>	PACK	0.00	0.00	0.00	500.00	

Sales Orders

- Enter the required kit **[Quantity]**.
- Click on **[save]**.
- If it is not processed, you will get a validation as **[Kit creation failed certain items on this order]**.



Acumatica Search... Revision Two Products Products Wholesale 11/30/2023 10:22 PM admin admin

Sales Orders SO011823 - ABC Holdings Inc

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

QUICK PROCESS CREATE SHIPMENT HOLD

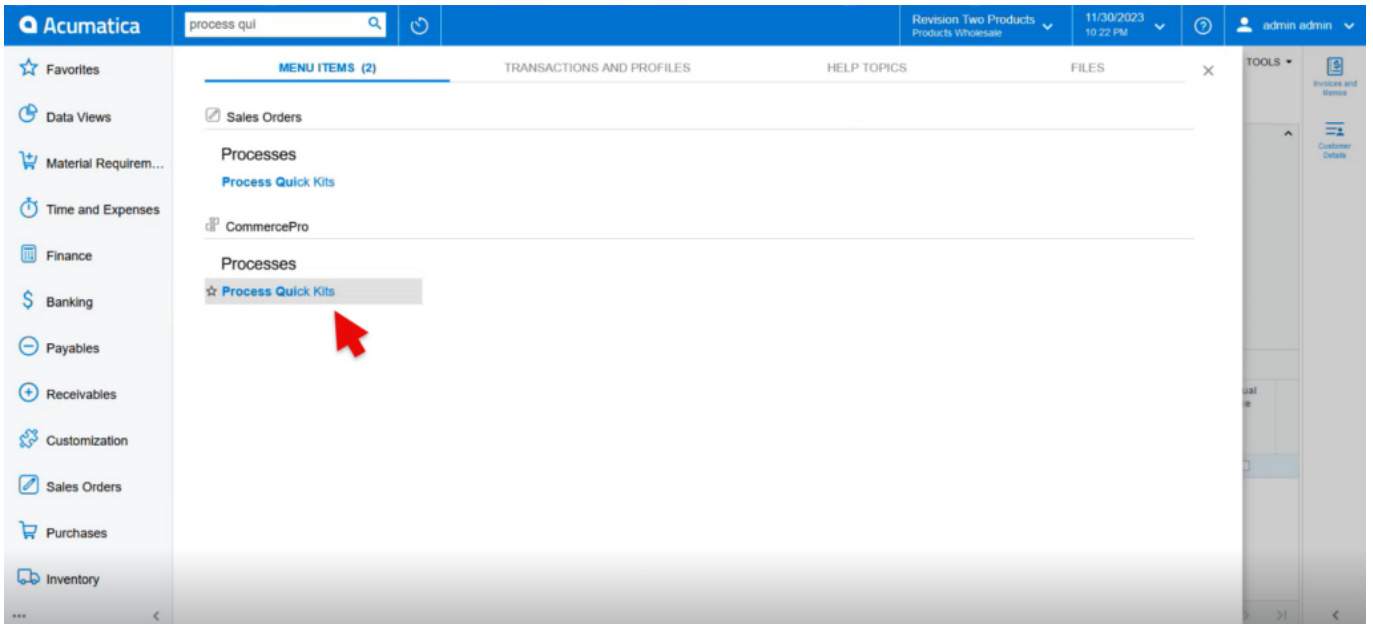
Order Type: SO Customer: ABC HOLDING - ABC Holdings Inc Ordered Qty: 2.00
 Order Nbr.: SO011823 Location: MAIN - Primary Location Discount Total: 0.00
 Status: Open Contact: VAT Exempt To: 0.00
 Date: 11/30/2023 Currency: USD 1.00 VIEW BASE VAT Taxable To: 0.00
 Requested On: 11/30/2023 Project: X - Non-Project Code Tax Total: 0.00
 Customer Ord.: Order Total: 1,000.00
 External Refer.: Description: Kit creation failed for certain items on this order

ADD BLANKET SO LINE	LINE DETAILS	ADD INVOICE	LINE ITEM ENHANCEMENT	ADD ITEMS	ADD MATRIX ITEMS	PO LINK	Qty. On Shipments	Open Qty.	Unit Price	Manual Price		
	Branch	Inventory ID	Related Items	Substitut Required	Warehouse	Line Description	Create Kit Assembly	*UOM	Quantity			
	PRODWHOLE	HIT			RETAIL	Kit	PACK	2.00	0.00	2.00	500.00	

On Hand 0.00 PACK, Available 0.00 PACK, Available for Shipping 0.00 PACK, Allocated 0.00 PACK, Possible Kit Qty 10.00

Sales Orders

- You must search for **[Process Quick Kits]** in the Global search bar.



Acumatica process qui Revision Two Products Products Wholesale 11/30/2023 10:22 PM admin admin

MENU ITEMS (2) TRANSACTIONS AND PROFILES HELP TOPICS FILES

Sales Orders

Processes

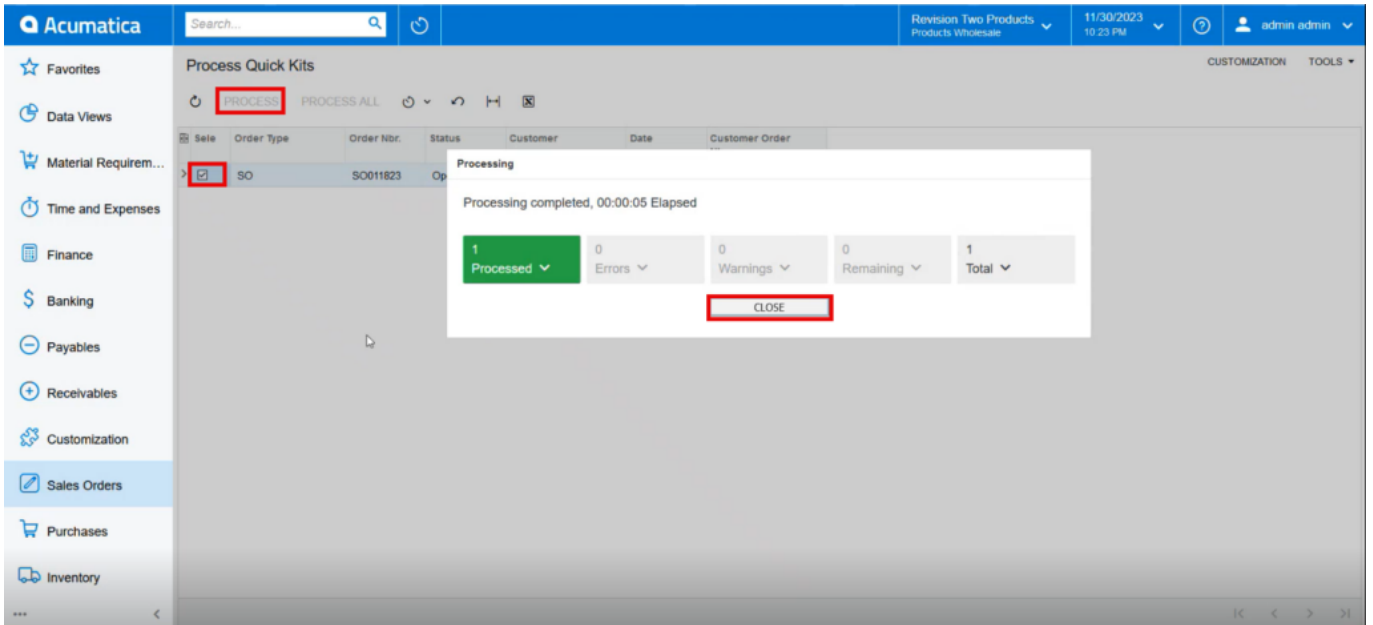
Process Quick Kits

CommercePro

Processes

Process Quick Kits

Process Quick Kits



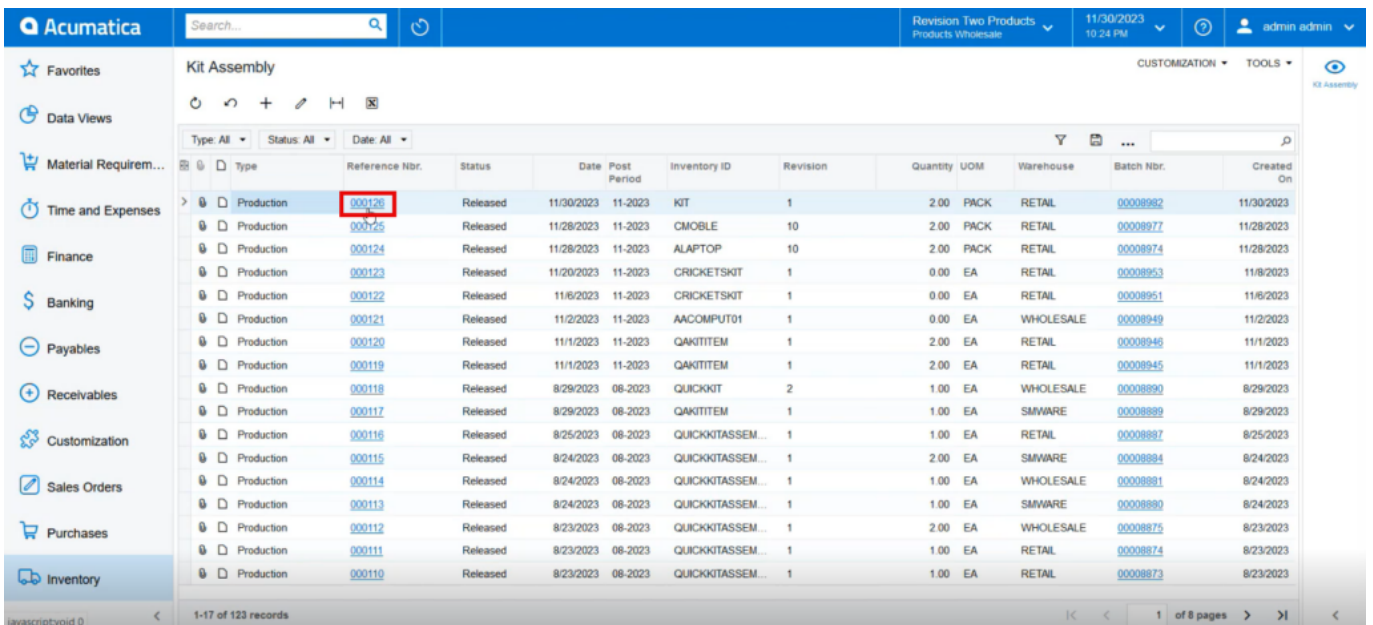
The screenshot shows the 'Process Quick Kits' interface in Acumatica. A 'PROCESS' button is highlighted in red. A modal window displays the message 'Processing completed, 00:00:05 Elapsed' and a summary table:

1	0	0	0	1
Processed	Errors	Warnings	Remaining	Total

The 'CLOSE' button in the modal is also highlighted in red.

Process Quick Kits

- To view the processed order, you must search for **[Kit Assembly]** in the Global search bar.

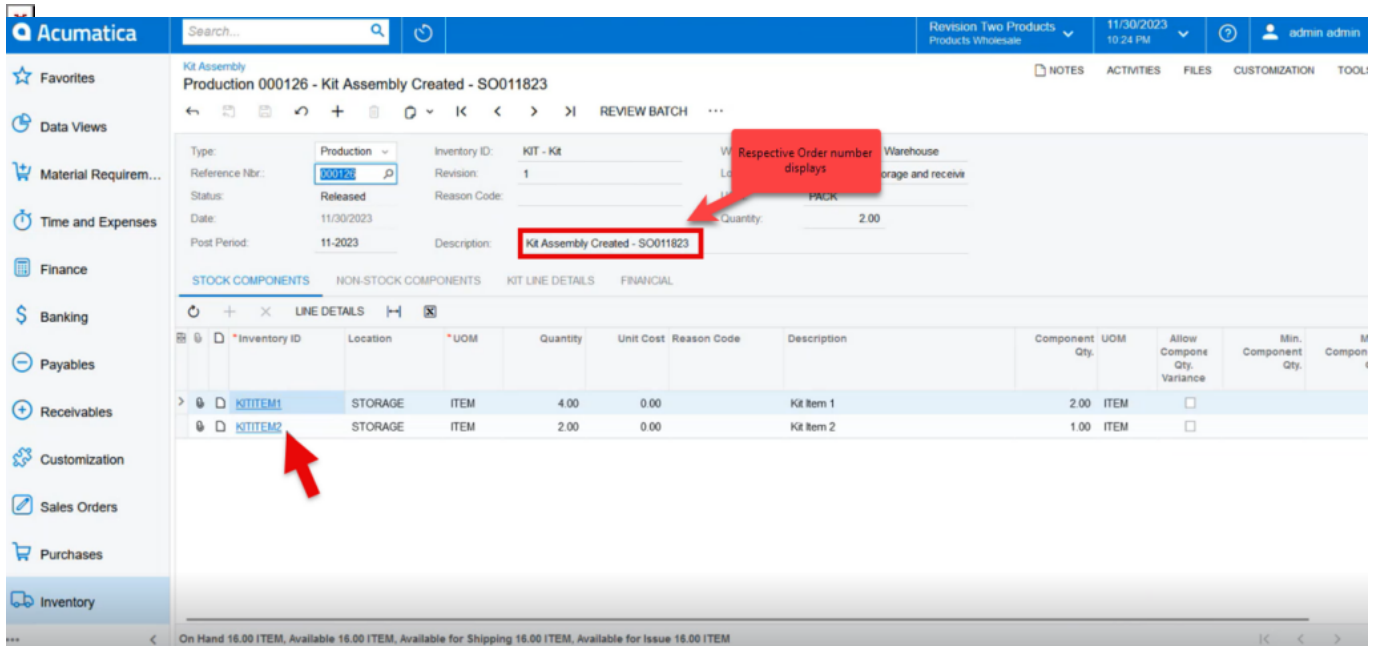


The screenshot shows the 'Kit Assembly' interface in Acumatica. A table lists production records with the following columns: Type, Reference Nbr., Status, Date, Post Period, Inventory ID, Revision, Quantity, UOM, Warehouse, Batch Nbr., and Created On. The first record is highlighted in red:

Type	Reference Nbr.	Status	Date	Post Period	Inventory ID	Revision	Quantity	UOM	Warehouse	Batch Nbr.	Created On
Production	000120	Released	11/30/2023	11-2023	KIT	1	2.00	PACK	RETAIL	00008982	11/30/2023
Production	000125	Released	11/28/2023	11-2023	CMOBLE	10	2.00	PACK	RETAIL	00008977	11/28/2023
Production	000124	Released	11/28/2023	11-2023	ALAPTOP	10	2.00	PACK	RETAIL	00008974	11/28/2023
Production	000123	Released	11/20/2023	11-2023	CRICKETSKIT	1	0.00	EA	RETAIL	00008953	11/8/2023
Production	000122	Released	11/6/2023	11-2023	CRICKETSKIT	1	0.00	EA	RETAIL	00008951	11/6/2023
Production	000121	Released	11/2/2023	11-2023	AACOMPUT01	1	0.00	EA	WHOLESALE	00008949	11/2/2023
Production	000120	Released	11/1/2023	11-2023	QAKITITEM	1	2.00	EA	RETAIL	00008946	11/1/2023
Production	000119	Released	11/1/2023	11-2023	QAKITITEM	1	2.00	EA	RETAIL	00008945	11/1/2023
Production	000118	Released	8/29/2023	08-2023	QUICKKIT	2	1.00	EA	WHOLESALE	00008890	8/29/2023
Production	000117	Released	8/29/2023	08-2023	QAKITITEM	1	1.00	EA	SMWARE	00008889	8/29/2023
Production	000116	Released	8/25/2023	08-2023	QUICKKITASSEM...	1	1.00	EA	RETAIL	00008887	8/25/2023
Production	000115	Released	8/24/2023	08-2023	QUICKKITASSEM...	1	2.00	EA	SMWARE	00008884	8/24/2023
Production	000114	Released	8/24/2023	08-2023	QUICKKITASSEM...	1	1.00	EA	WHOLESALE	00008881	8/24/2023
Production	000113	Released	8/24/2023	08-2023	QUICKKITASSEM...	1	1.00	EA	SMWARE	00008880	8/24/2023
Production	000112	Released	8/23/2023	08-2023	QUICKKITASSEM...	1	2.00	EA	WHOLESALE	00008875	8/23/2023
Production	000111	Released	8/23/2023	08-2023	QUICKKITASSEM...	1	1.00	EA	RETAIL	00008874	8/23/2023
Production	000110	Released	8/23/2023	08-2023	QUICKKITASSEM...	1	1.00	EA	RETAIL	00008873	8/23/2023

Kit Assembly

- Click on **[Reference Nbr.]**.
- In the description, you can view the **[kit Assembly created with SO no]**.



Acumatica

Search...

Revision: Two Products
Products Wholesale

11/30/2023
10:24 PM

admin admin

Kit Assembly
Production 000126 - Kit Assembly Created - SO011823

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

← → REVIEW BATCH ...

Type: Production
Inventory ID: KIT - Kit
Warehouse: Storage and receive

Reference Nbr.: 0001823
Revision: 1
Quantity: 2.00

Status: Released
Reason Code: PACK

Date: 11/30/2023
Post Period: 11-2023
Description: Kit Assembly Created - SO011823

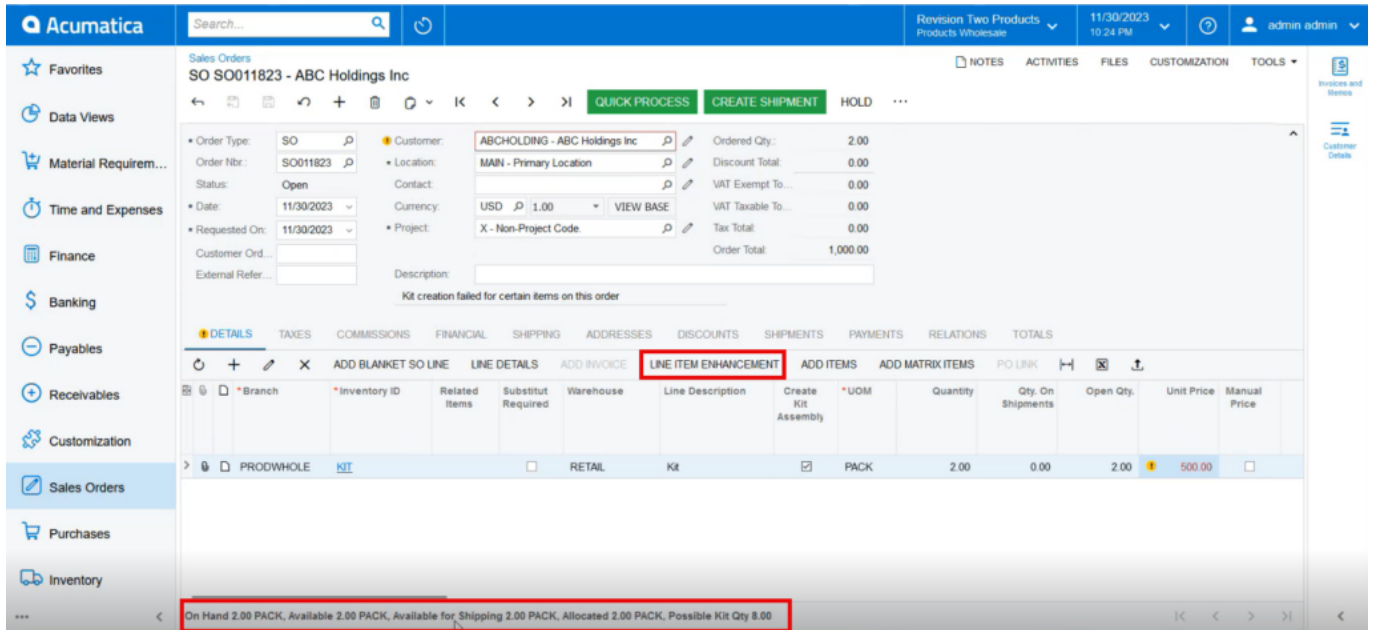
STOCK COMPONENTS NON-STOCK COMPONENTS KIT LINE DETAILS FINANCIAL

Inventory ID	Location	UOM	Quantity	Unit Cost	Reason Code	Description	Component Qty.	UOM	Allow Component Qty. Variance	Min. Component Qty.	Max. Component Qty.
KITITEM1	STORAGE	ITEM	4.00	0.00		Kit Item 1	2.00	ITEM	<input type="checkbox"/>		
KITITEM2	STORAGE	ITEM	2.00	0.00		Kit Item 2	1.00	ITEM	<input type="checkbox"/>		

On Hand 16.00 ITEM, Available 16.00 ITEM, Available for Shipping 16.00 ITEM, Available for Issue 16.00 ITEM

Kit Assembly

- Navigate to the sales orders screen and check the possible kit quantity. If the quantity is less than the possible kit quantity, this indicates that kit has been Created and quantity is forwarded to Parent item.



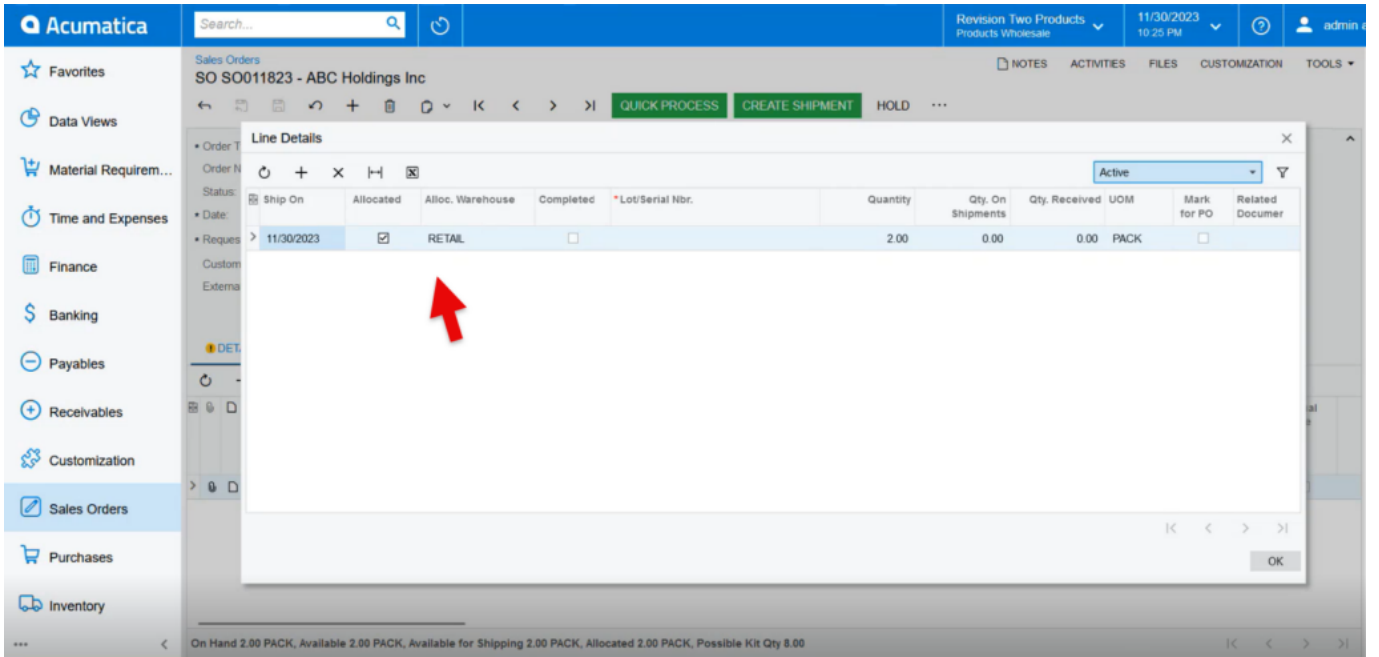
The screenshot shows the Acumatica Sales Order interface for order SO SO011823. The 'LINE ITEM ENHANCEMENT' tab is selected, displaying a table with the following data:

Branch	Inventory ID	Related Items	Substitut Required	Warehouse	Line Description	Create Kit Assembly	UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Manual Price
PRODWHOLE	KIT			RETAIL	Kit	<input checked="" type="checkbox"/>	PACK	2.00	0.00	2.00	500.00	

At the bottom of the screen, a status bar is highlighted with a red box, containing the text: "On Hand 2.00 PACK, Available 2.00 PACK, Available for Shipping 2.00 PACK, Allocated 2.00 PACK, Possible Kit Qty 8.00".

Sales Orders

- Click on **[Line Item Enhancement]**.
- This screen shows the allocated quantity for the order.



The screenshot shows the Acumatica interface for a sales order (SO SO011823 - ABC Holdings Inc). A 'Line Details' window is open, displaying a table with the following data:

Ship On	Allocated	Alloc. Warehouse	Completed	Lot/Serial Nbr.	Quantity	Qty. On Shipments	Qty. Received	UOM	Mark for PO	Related Documer
11/30/2023	<input checked="" type="checkbox"/>	RETAIL	<input type="checkbox"/>		2.00	0.00	0.00	PACK	<input type="checkbox"/>	

A red arrow points to the 'Allocated' checkbox in the first row. The status bar at the bottom indicates: 'On Hand 2.00 PACK, Available 2.00 PACK, Available for Shipping 2.00 PACK, Allocated 2.00 PACK, Possible Kit Qty 8.00'.

Line Details